



North Carolina Procurement Transformation

NC E-Procurement Ariba Buyer Upgrade January 2012



Agenda

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- **Ariba Buyer Upgrade**

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- Communications Activities

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- **Questions & Answers**



Welcome & Introductions



Jocelyn Thornton

Procurement Transformation Director



New Implementation Timeline

“Thank you for your continued support and encouragement of this effort....”

- Anne Bander

- The Implementation timeline has been moved to the **start of the new fiscal year**
- What are we doing in the interim?
 - Enhanced training
 - Online training development
 - Issue resolution
 - Agency Readiness Preparation





NCID Interface Status Update

Single point of administration and control for simplified management and standardized processes for the State, agencies, end users, and customer applications

- NC E-Procurement team began sending NCID User Mapping Sign Off communications to confirm NCID mappings or to establish new NCIDs.
 - All **community colleges** should have received the request with a requested return date of November 23rd. To date, we have received **41%** (24/58) completed spreadsheets. We are following up with the Community Colleges who have not responded over the phone.
 - All **school systems** have received the request. To date, we have received **31%** (36/115) completed spreadsheets. We will begin following up with school systems who have not responded yet over the phone in the coming days.
 - All **State Agencies** should have received the request with a requested return date of January 27th. To date, we have received **21%** (12/57) responses from State Agencies.
- The NCID interface is actively being tested as part of the upgrade system test process.
 - The NC E-Procurement 9r1 system is integrated with an NCID test instance to verify user updates and authentications work as expected.



System Test Updates

The Ariba Upgrade team will execute 3 passes of system testing to test Base Functionality, Enhancements, Integration, Batch, and Scripting.

- Completed 2 passes of System Testing
- Currently mid-way through Pass 3 of System Test
 - Full end to end testing (integration, batch, scripts, monitoring etc.)
 - Tested ~40% of conditions with a **92% pass rate**
 - Continually resolving and retesting issues found during testing
 - Working to test each integration touch point during this pass



New Functionality Highlights

Users can search for any transaction directly from the Home Dashboard. My Labels will be used to organize transactions.

The screenshot shows the Ariba Spend Management Home Dashboard. The top navigation bar includes 'Home', 'Help', and 'Logout'. The main dashboard area is divided into several sections:

- Common Actions:** Includes 'Create' (eRequisition, UserMaintenance, AddressMaintenance) and 'Manage' (Receive, Administrator, Reports).
- Search:** A search bar with an 'ID:' field and a 'Search' button. Below it, a 'My Labels' section shows 'Archive Items (3)', 'Food Services Department (1)', and 'Library (1)'. This section is highlighted with a red dashed oval.
- Recently Viewed:** Lists recent transactions like 'PR294 Untitled Requisition'.
- To Do:** A table showing tasks with columns for ID, Date, From, Status, Title, and Required Action.
- My Documents:** A table showing documents with columns for ID, Title, Date, and Status.

ID	Date ↓	From	Status	Title	Required Action
PR342	1/19/2012	Wade Quinn	Pending	chief pro	Approve
UP36	1/4/2012	CatalogBrowser	Submitted	User Profile Changes for CatalogBrowser	Approve

ID	Title	Date ↓	Status
PR358	Untitled Requisition	1/19/2012	Composing
PR299	Untitled Requisition	1/19/2012	Composing
PR297	Untitled Requisition	1/19/2012	Composing



New Functionality Highlights

Users will be directed to the Catalog Home page when creating requisitions. The Catalog Navigation Panel allows users to quickly refine search results.

The screenshot displays the Ariba Spend Management interface. At the top, the header includes the North Carolina state seal, the Ariba logo, and the text "SPEND MANAGEMENT". Navigation links for "Home", "Help", and "Logout" are in the top right. Below the header, a "Welcome Ariba System" message is visible. The main navigation bar includes "Home", "Procurement", "Create", "Search", "Manage", "Recent", and "Preferences". A "Customize" link is also present.

The "Catalog Home" section is the central focus. It features a "Supplier" list on the left, a "Language" dropdown, and a "Favorites" section. The "Supplier" list includes entries such as "ACHIEVA, INC. (7)", "B.W. Wilson Paper Co. (6)", "BLANKENSHIP ... (8)", "BOBBY MURRAY CHEV ... (18)", "CAROLINA BIOLOGICAL ... (1)", "EMC CORPORATION (1)", "En Pointe ... (1)", "Equote Punchout (1)", "GODWIN MFG CO INC (23)", "IBM - ... (1)", "IKON OFFICE ... (267)", "LEXMARK ... (1142)", "LRC, INC (39)", "Mckesson ... (7470)", "MTS SEATING (46)", "Software House ... (2)", "STORR OFFICE ... (424)", "techline ... (639)", "UNISOURCE INC (97)", and "XEROX CORPORATION (575)". A "Show All ..." link is at the bottom of the list. The "Language" dropdown is set to "English (12123)". The "Favorites" section shows "- Recent Choices -".

The "Catalog Home" section also includes a "Search" bar with a "Search" button and an "Options" link. Below the search bar, there are input fields for "Supplier Part #:", "Contract ID:", and "Commodity Code:". To the right of the search bar, there is a "Browse By: Categories | Suppliers" link and a "Create Non-Catalog Item" button.

The "Catalog Home" section displays a grid of category links and item counts:

- APPLIANCES, ELECTRICAL, CLOCKS (2)**
031-11: Blowers: Industrial Types (2)
- BUILDING MATERIALS, MAINTENANCE (2)**
031-11: Blowers: Industrial Types (2)
- CLOTHING & TEXTILE ITEMS (110)**
CARPET AND FLOOR MAINTENANCE AND MACHINES (110)
- FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (1663)**
420-00: FURNITURE: CAFETERIA, CHAPEL, DORMITORY, HOUSEHOLD, LIBRARY, LOUNGE, SCHOOL (484)
425-00: FURNITURE: OFFICE (1179)
- MEDICAL & LAB EQUIPMENT & SUPPLIES (7470)**
475-00: HOSPITAL, SURGICAL, AND RELATED MEDICAL ACCESSORIES AND SUNDRY ITEMS (7470)
- OIL & GAS**
405-09: Fuel Oil, Diesel (1)
- SERVICES (CONTRACTUAL & CONSULTANT) (830)**
910-09: Carpet Cleaning, Dyeing, Installation and Repair (1)
918-28: Computer Hardware Consulting (5)
920-31: Installation of Computers, Peripherals, and Related Equipment (Including Software) (8)
939-00: EQUIPMENT MAINTENANCE, RECONDITIONING, AND REPAIR SERVICES - OFFICE, PHOTOGRAPHIC, AND RADIO/TELEVISION EQUIPMENT (816)
- TECHNOLOGY ITEMS (1455)**
COMPUTERS AND RELATED ITEMS (1455)
- TRANSPORTATION (VEHICLES & SUPPLIES INCLUDING MARINE) (41)**
TRANSPORTATION, VEHICLES AND SUPPLIES (41)
- Uncategorized Items (8)**

The bottom of the page shows a status bar with "Local intranet | Protected Mode: On" and a "100%" zoom level.



Master Data

Key master data will be extracted from the current version and then transformed to load to the new version.

- Key data elements **will** be moved with the new system:
 - Bill To Address
 - Ship To Address
 - Contracts, Bids, and Open Book Data
 - Suppliers and Catalogs
 - NCAS Accounting Elements
 - Payment Terms



Master Data

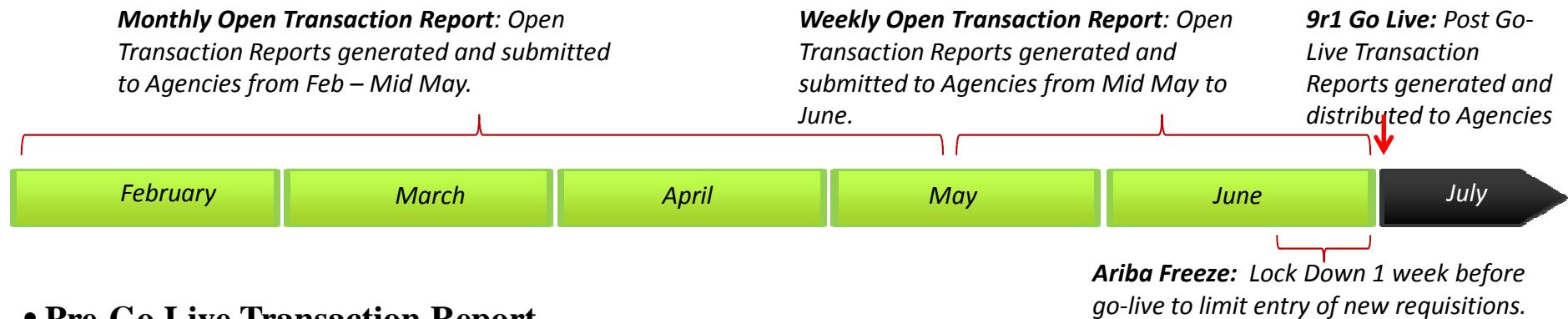
User Data may be impacted by the transformation from the current version to Ariba 9r1

- User **Login IDs will be converted** to NCIDs per the worksheets you have been working with.
- In some cases, users have multiple NCEP accounts. Due to NCID each user will be **limited to only one account**. This may impact your entities' management chain. We will be working with you to resolve duplicate ID issues.
- Traditionally users have been assigned to Roles for both permissions and approval flow. Now Roles will be used to assign permissions and Groups will be used for the Approval flow. We will be automatically converting users to appropriate Groups and Roles.
- We will be **working with you** over the coming months to ensure a smooth transition of user data to the new system.



Historical Data Approach Report Summary

Moving the implementation date should reduce the number of open transactions that need to be re-entered as part of the upgrade.



• Pre-Go Live Transaction Report

- Generated based on the data reconciliation between Ariba and NCAS.
- The report **contains line item details** including line number, accounting, amount, quantity, good/service indicator, payment basis, supplier, commodity code, inventory information, etc.

• Post Go-Live Transaction Report

- Contains line item details (same as the pre go-live report) as well as the amount the has been received and the **remaining encumbrance amount** before the transaction was closed automatically.
- The Post Go-Live report is intended to provide all relevant information necessary to re-enter the transaction



Historical Data Approach Guidance & Options for a Smooth Transition

There are several actions that may be taken to assist agencies in achieving a smooth transition with minimal interruptions.

- The system **will not allow** the entry of new requisitions or purchase orders during the week of June 25th – June 29th . Many agencies are evaluating agency policies to extend that timeline.
- Creation of a “**crosswalk**” from old to new orders, and enhanced management of in flight transactions:
 - Enter the new PO number into the report spreadsheet as a cross-reference to the old PO number.
 - Enter the old PO number for A/P so they know what to pay if the vendor invoice number contains the new PO number.
 - Option to not send the new order to the vendor. If vendor doesn’t need the new order (e.g., maybe the goods were received but not yet entered), mark as “don’t send to vendor”.
 - New POs will have a prefix other than “EP”.



Historical Data Approach Guidance & Options for a Smooth Transition

Work to reduce the number of orders and requisitions that must be re-entered in advance of the cutover. This hopefully will be facilitated naturally as part of the year end close processes.

- Order early enough to **receive goods prior to June 29th**. Currently, goods must be received through E-Procurement.
- Leave **service orders open in NCAS** and e-Procurement, as it is an option to pay them directly in NCAS and receipt of services is not required. However, if the order requires a change in the future, it will need to be closed in NCAS and a new PO for the service issued in the new Ariba system.
- **Hold off entering new service POs** that won't take effect until next fiscal year.
- Agencies may evaluate **modifying existing P-card** limits for a limited period of time to make **emergency** purchases during the lock down period (in accordance with NC procurement rules and policies).



Communications Activities

Communications are increasing. Distribution of announcements for the entire user community has begun.

- Distributed “The Source” newsletter in December and January to **all** NC E-Procurement users
- Newsletter provides highlights of new features and current topics
- January issue included an announcement of the go-live date change to July 2012

GO-LIVE DATE CHANGE

Based on the feedback we have received from several of our users, we are able to move the upgrade go-live date from March 2012 to July 2012. More information about this change will be discussed in our next Agency Briefing Sessions.

WHAT'S BEEN ACCOMPLISHED

The NC E-Procurement Upgrade team has completed Pass 2 of system testing. We have started Pass 3 of system testing that includes full integrations with systems external to NC E-Procurement. The functional team has also wrapped up approval flow discussions with each entity so that these configurations can be tested in Pass 3.

Requisitioning Made Easier

The upgraded NC E-Procurement system improves requisition creation. The 'Create eRequisition' wizard will no longer be used to create a new requisition. As mentioned in last month's newsletter, a requisition can be created directly from the dashboard style homepage. By creating directly from the dashboard, you will encounter less steps to submit a requisition. While creating a new requisition, you will also notice several enhancements including the ability to add and delete comments that you created. Today, you would need to contact your agency's purchasing agent or the NC E-Procurement Helpdesk to remove unwanted comments. Another enhancement you will see is increased information on the History tab of the requisition. In addition to requisition approvals and changes to requisitions, you will also see when comments and attachments are deleted from a requisition providing an enhanced audit trail.

Catalog Enhancements

With the upgrade of NC E-Procurement, you will find that searching in the State Term Contract Catalog will be easier and provide more accurate results. For example, when you execute a search for the word 'battery,' the search results will include items containing the word 'battery' and 'batteries' in the description. Fuzzy searches will return exact and highly relevant matches even though the keyword(s) may be misspelled. Along with the improved search capabilities, you will find that comparing products within the State Term Contract Catalog will improve. Similar to many online retailers today, you will have the ability to run a side-by-side comparison of items you are wishing to purchase. Information like price, product description, manufacturer and lead time are included in the side-by-side comparison to assist users in purchasing items that better meet the needs of their agency.

What's New: My Labels

Today, you utilize Personal Folders in NC E-Procurement to organize requisitions for future access. In the upgraded system, Personal Folders will be replaced with 'My Labels.' My Labels will allow you to organize your requisitions, but will be accessed differently. During the requisitioning process, you will have the option to add a label to the requisition instead of waiting until the requisition is completed to move to a Personal Folder. To find a labeled requisition, users can use the Search portal on the dashboard. More information about My Labels will be included in upgrade training sessions.

NC E-Procurement
your service
www.ncgov.com

More information about [Procurement Transformation](#) and the [NC E-Procurement Upgrade](#) can be found on the web.

If you have questions or comments about information covered in this issue, please contact the NC E-Procurement Help Desk at ephelpdesk@its.nc.gov.



Communications Activities

Preparation for user training and job aid updates is underway.

- “What’s New” training presentation will be available to users
- **Job Aids** will be updated to reflect new functionality
- **Training environment** is being built out
- **Additional training sessions** will be provided as a result of the date change

The screenshot shows the NC E-Procurement website. The header includes the NC seal and the text "E-Procurement Your service www.nc.gov". Navigation buttons for "Buyer", "Vendor", "User Training", and "Contact Us" are present. A sidebar on the left lists various links, with "User Training" highlighted. The main content area is titled "Training Job Aids" and includes a paragraph about the PDF format of the training materials. Below this, there is a section for "Use the Quick Links Below:" with a list of links. At the bottom, a "System Navigation" table is displayed.

Course	Audience
E-Procurement Overview	All Users
System Searches	All Users
Personal Folders	All Users
Personal Profile	All Users
Delegating Approval Authority	All Users

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Communications Activities

Overall readiness status will be gathered through a regular reporting process from entities using a Readiness Checklist .

- The Readiness Checklist will allow entities to **report or confirm** their progress in several key areas:
 - In-Flight Transactions
 - Approval Flow Configurations (State Agencies)
 - NCID User Mapping
 - Commodity Code Update (School Systems and Community Colleges)
 - User Readiness/Training
- Weekly reporting is expected to **begin in May**
- Data already available to upgrade team will be provided to entities for review
- Upgrade team will hold **kick off sessions** with designated reporting contacts to review the process in advance



Communications Activities

Continue to access the NC E-Procurement website for additional resources:

eprocurement.nc.gov

- New additions include **NCID FAQs** that were distributed to school systems and community college contacts and the **December 2011 Session Briefing** presentation

The screenshot displays the NC E-Procurement website. At the top, there is a navigation bar with the state seal and a logo for 'E-Procurement your service www.ncgov.com'. Below this are buttons for 'Buyer', 'Vendor', 'User Training', and 'Contact Us'. The main content area features a sidebar with links such as 'NC E-Procurement Home', 'Buyer Login', 'Vendor Login', 'Vendor eQuote Login', 'Buyer', 'System Tips', 'NC E-Procurement Upgrade Resources', 'New Functionality', 'Participation Report Guidelines (LEAs)', 'Frequently Asked Questions', 'Registered Vendor Search', 'State Term Contract Catalog Search', 'State Term Contracts Listing', 'News & Events', and 'Quick Links'. The main content area is titled 'NC E-Procurement Upgrade' and contains an announcement about the upgrade of the Ariba Buyer software. Below this, there is a section for 'Resources' and 'Session Briefings'. A second session briefing is mentioned, focusing on the upgrade with emphasis on the following:

- NCAS Agency S
- Community Coll
- Local Education

An additional session briefing is also mentioned, focusing on the upgrade with emphasis on the following:

- NCAS Agency S

The 'NCID Frequently Asked Questions' section is also visible, containing several questions and answers related to the NCID system and the upgrade process.



Questions?